

MICHIGAN STATE HOUSING DEVELOPMENT AUTHORITY

REQUEST FOR PROPOSALS

DATE OF ISSUE: **April 24, 2008**

TO: Potential Providers of Services

RE: Request for Proposals for **Communications/Marketing Contract**

**I. Services Sought by Authority:**

The Michigan State Housing Development Authority ("Authority") is seeking an individual or firm that is authorized to do business in Michigan to **assist the Authority in promoting its mission in the affordable housing, community development, and homeless arena, raising awareness of the Authority's programs and services throughout Michigan, and increasing homeownership and multifamily production.** A detailed description of the work is described in the Scope of Work, which is attached as Exhibit A to this Request for Proposals (RFP).

A prospective Contractor is asked to **convincingly** demonstrate their capacity, experience and ability to perform or deliver each of the tasks, activities or projects described in the Scope of Work (Exhibit A) within the parameters defined. Bids must be submitted on a per unit basis, not as a total contract amount. For example: Graphic design - \$X amount per hour; design consulting meeting - \$X amount per hour, strategic planning consulting - \$X amount per hour, general meetings - \$X amount per hour, time spent at conference - \$X amount per hour, writing - \$X amount per hour, web management - \$X amount per hour, web content updates - \$X amount per hour, radio production/TV production - \$X amount per hour. Be as specific as possible in the categories you select as they relate to the activities described. The more specific your submission and the higher the quantity of categories, the better. If preferred, a flat fee for any task or activity may be used. A total contract amount will be formulated with the Contractor based upon the per unit (or flat) fees after the selection process has been completed and the successful Contractor named. For planning purposes, the total amount of the contract could be, but is not guaranteed, to be in the \$300,000 (plus or minus) range. This contract may also be negotiated as a multiyear contract in the plus or minus range of \$900,000. (See Exhibit B for more instructional details)

Suggestion: Visit the MSHDA Web site at [www.michigan.gov/mshda](http://www.michigan.gov/mshda) for a greater understanding of the Authority's programs and operations.

## **II. Required Qualifications:**

The Authority has identified the following qualifications that it believes are necessary for the successful performance and completion of the services described in the Scope of Work. The prospective contractor ("Prospective Contractor") must:

- A.** Have experience providing the services described in the Scope of Work (Exhibit A) or similar services, assisting a two full time and one part time in house communications staff in the following skill areas:
  - Graphic Design capabilities (Ability to use Adobe InDesign)
  - Facilitation skills
  - Broadcast production abilities (Television, radio, video, Web-based productions)
  - Ability to create communications plans
  - Web development, design and management skills
  - Excellent writing skills (news releases, feature articles, ad copy)
  - Capacity to produce computer generated contract billing status reports
  - Capacity to handle dozens of projects simultaneously for a variety of divisions within the Authority as well as overall Authority initiatives and events
  - A working knowledge of housing, community development and homeless issues
  - Conference planning and management skills
  - Photographic skills
  - Design of surveys and focus group experience
  - Capacity to provide an on site liaison designer 12-15 hours per week
- B.** Assign experienced personnel to perform the services or have personnel supervised by experienced staff.
- C.** Be a Michigan entity (limited partnership, limited liability company, for profit corporation or non-profit corporation), a firm that is authorized to do business in the State of Michigan, or a division or office of a Michigan municipality. The Prospective Contractor will be required to submit:
  - 1.** A Certificate of Status issued by the Corporations and Securities Bureau of the Michigan Department of Labor & Economic Growth; and
- D.** Have an office in the State of Michigan.

- E.** Have phone, internet, and e-mail access. Internet and e-mail access must be adequate enough to allow Prospective Contractor to download and upload data and files and receive files and attachments from Authority staff.
- F.** Agree to satisfy the following requirements prior to the execution of the contract with the Authority:
  - 1.** Indemnify, defend and hold harmless the Authority, its Board, officers, employees and agents, from and against all losses, liabilities, penalties, fines, damages and claims (including taxes), and all related costs and expenses (including reasonable attorneys' fees and disbursements and costs of investigation, litigation, settlement, judgments, interest and penalties), arising from or in connection with any of the following:
    - a.** any claim, demand, action, citation or legal proceeding against the Authority, its employees and agents arising out of or resulting from (1) the services provided ("Services") or (2) performance of the Services, duties, responsibilities, actions or omissions of the Contractor or any of its subcontractors under this Agreement. .
    - b.** any claim, demand, action, citation or legal proceeding against the Authority, its employees and agents arising out of or resulting from a breach by the Contractor of any representation or warranty made by the Contractor in the Agreement;
    - c.** any claim, demand, action, citation or legal proceeding against the Authority, its employees and agents arising out of or related to occurrences that the Contractor is required to insure against as provided for in this Contract;
    - d.** any claim, demand, action, citation or legal proceeding against the Authority, its employees and agents arising out of or resulting from the death or bodily injury of any person, or the damage, loss or destruction of any real or tangible personal property, in connection with the performance of services by the Contractor, by any of its subcontractors, by anyone directly or indirectly employed by any of them, or by anyone for whose acts any of them may be liable; provided, however, that this indemnification obligation shall not apply to the extent, if any, that such death, bodily injury or property damage is caused solely by the negligence or reckless or intentional wrongful conduct of the Authority;
    - e.** any claim, demand, action, citation or legal proceeding against the Authority, its employees and agents which results from an act or omission of the Contractor or any of its

subcontractors in its or their capacity as an employer of a person.

- f. any action or proceeding threatened or brought against the Authority to the extent that such action or proceeding is based on a claim that any piece of equipment, software, commodity or service supplied by the Contractor or its subcontractors, or the operation of such equipment, software, commodity or service, or the use or reproduction of any documentation provided with such equipment, software, commodity or service infringes any United States or foreign patent, copyright, trade secret or other proprietary right of any person or entity, which right is enforceable under the laws of the United States.

- G. Agree to execute a contract acceptable to the Director of Legal Affairs.

### **III. Submitting Proposal:**

Firms wishing to submit proposals must submit one (1) original and three (3) copies of a proposal to provide the services described in Exhibit A (Scope of Work). Submitted proposals must respond to and address the questions listed in Exhibit B (Proposal Instructions and Selection Criteria).

The due date for the Authority's receipt of the proposals responding to this Request for Proposal ("RFP") is **Friday, May 16, 2008 at 4 p.m.**

The Authority shall not be liable for any costs that a firm or individual may incur while preparing a proposal. The Authority shall not be liable for any costs that a firm or individual may incur prior to the complete execution of a contract. If the Authority enters into a contract, the Authority's consideration (payment) shall be limited to the term of the contract.

### **IV. Communications with Authority Staff Prior to Selection of Proposal**

Any questions, raised by Providers concerning the RFP may be submitted, in writing via email only using the subject line to the attention of:

**Mary Lou Keenon**  
MSHDA  
735 East Michigan Ave.  
PO Box 30044  
Lansing, Michigan 48909

E-mail: [keenonm@michigan.gov](mailto:keenonm@michigan.gov)

To ensure a fair and impartial process, Authority staff will not address non-written questions concerning the RFP. Phone calls involving the RFP or related questions will not be accepted. Firms submitting bids shall not contact any Authority staff or Board members except **Mary Lou Keenon—all communications with Mary Lou Keenon must be received in writing by Wednesday, May 7, 2008**

MSHDA will answer appropriate questions received in a timely manner (e.g., information not covered/answered in the RFP, interpretation issues, etc.) by email to all Providers on or before **Friday, May 9, 2008**. MSHDA will hold no other question sessions or bidders conferences.

If, prior to the proposal deadline, the Authority deems it necessary to provide additional clarifying information, or to revise any part of the RFP, supplements or revisions will be provided to all recipients of the RFP who have indicated they will submit a proposal. Proposals will then be evaluated based on the terms and conditions of the RFP, any supplements or revisions thereof, and the answers to any written questions.

#### **V. Selection of Proposal:**

A team of Authority staff members will select the proposal based on Selection Criteria, which is set forth in Exhibit B (Proposal Instruction and Selection Criteria).

#### **VI. Processing Required Forms & Contract Execution:**

The required forms will be submitted to Civil Service for approval, **prior** to Board approval. Contracts that equal or exceed \$25,000 must be Board approved. Thereafter, a contract will be forwarded to the firm ("Selected Firm") that submitted the selected proposal with instructions to execute and return three copies. Upon receiving the executed copies, the Office of Legal Affairs will submit the executed copies to a duly authorized Authority signatory for execution on behalf of the Authority.

#### **VII. Michigan Freedom of Information Act**

Documents submitted to the Authority shall be subject to the Michigan Freedom of Information Act ("FOIA"). In the event a request for submitted documents is made to the Authority, the Authority's FOIA Coordinator will redact or withhold information and/or documents that are exempt from disclosure under FOIA. See *MCL 15.243*. Please note that any requests by non-MSHDA personnel to review proposals will be denied until the deadline for submission of the bids has expired. See *MCL 15.243(1)(j)*.

## RFP - EXHIBIT A

### SCOPE OF WORK

#### I. Overview:

The Office of Program Policy and Market Research (PPMR) of the Michigan State Housing Development Authority ("Authority") is seeking an individual/firm to assist the Authority in promoting its mission in the affordable housing, community development and homeless issues community, raising awareness of the Authority's programs and services throughout Michigan, and increasing homeownership and multifamily production.

The Authority currently employs a small communications staff consisting of two full time employees and one part time student assistant. The Authority is seeking to supplement this communications team by seeking the services of an outside firm to enhance the effectiveness of its communications efforts. The Authority is experiencing tremendous growth both externally statewide in terms of the services and programs it provides its many partners and Michigan citizens and internally with necessary staff support services.

#### II. Objectives, Tasks & Activities, and Deadlines:

- A. **Objectives.** To successfully perform the services described in Section I above, the contractor ("Contractor") must satisfy the following objectives:
1. Assist the MSHDA communications team with all aspects of branding and promoting the Authority's overall mission to **external** target audiences.
  2. Assist the MSHDA communications team in creating a blueprint outlining the communications needs of all **internal** MSHDA divisions and in carrying out a variety of services necessary to support their divisional work. For example: brochures, assisting in planning press events, assisting in the creation of timelines and costs for each division, etc.
  3. Assist the MSHDA communications team in creating strategies to raise production levels in MSHDA's Homeownership and Multifamily divisions.
- B. **Activities/Responsibilities Necessary to Complete Scope of Work**

To achieve the objectives, the contractor ("Contractor") shall perform the following activities/tasks. Contractor must indicate if these tasks will be performed in house or require subcontracting.

1. Assist in the design and creation of brochures, newsletters, and any other collateral materials for the Authority and divisions as needed throughout the contract period (Use of InDesign or PageMaker required)
2. Assist in conducting and facilitating strategic planning sessions to create communications plans by division
3. Assist in writing, producing, post producing, placement and distributing radio and television commercials
4. Provide a dedicated person from the Contractor's staff to assist the Authority in the management of web content for four internal divisions
5. Assist the communications staff in writing news releases, feature articles, ad copy, and contribute to special publications such as newsletters and an annual report.
6. Assist the communications staff with the planning and management of several Authority-sponsored conferences throughout the contract term. Includes designing of conference signage, collateral material, special publications, etc.
7. Assist communications staff in designing surveys and/or conducting focus group sessions for divisions if needed
8. Assist the communications staff in documenting events and/or initiatives and projects with photos. This task may require some statewide travel to obtain "before and after" photos of developments within the Authority's portfolio or success stories from people who have benefited from Authority programs and/or initiatives
9. Demonstrate the capacity to handle dozens of projects simultaneously for a variety of divisions within the Authority as well as overall Authority initiatives and events
10. Provide strategic marketing and public awareness assistance to Authority communications staff in support of divisional needs
11. Assist the communications staff with special events such as annual promotional activities, press conferences, etc.
12. Assist in the development of a recognition program for lenders, housing counselors and REALTORS®
13. Assist the communications staff in the development of paid advertising campaigns and/or co-op advertising for Homeownership and Property Improvement programs
14. Provide a dedicated Contractor staff member to place the Authority's legal advertising on a statewide basis throughout

the term of the contract (approximately \$300,000-\$400,000 annually). Authority staff will interact directly with that dedicated staff member

15. Set aside one and one-half to two hours each Monday morning to meet with communications staff and the Authority's Homeownership marketing team to review assignments and status of all projects in the pipeline
16. Assist the communications staff in researching and applying for program recognition awards
17. Assist in designing and producing general or training videos, PowerPoint and/or Webinars for the Authority and its divisions as needed
18. Assist the communications staff in creating a marketing plan targeting consumers for the Authority's Housing Locator. See Web site at [www.michiganhousinglocator.com](http://www.michiganhousinglocator.com)
19. Provide an on site liaison designer 12 – 15 hours per week
20. Produce computer generated contract billing status reports monthly or more often if requested to track projects and adherence to the specified Scope of Work as stated in the resulting contract

### **C. Deadlines for Completing Objectives.**

The term of the potential contract is July 1, 2008 through June 30, 2009. The section above lists objectives, tasks and activities that the Contractor will be asked to deliver or perform during the contract time frame. Many of these deliverables will be ongoing throughout the contract and are part of every day operations. However, some individual projects, tasks or activities (such as press events, conferences, brochures, advertising production and media placement, etc.) are time sensitive and will need to be completed around deadlines. The Contractor will be apprised of those projects and will be expected to have the capacity to meet those deadlines as they occur.

### **III. Standards for Performance:**

The Contractor shall perform the tasks/activities and complete the objectives in accordance with the following standards. Your charge is to demonstrate in your proposal your firm's ability to meet these standards.

1. The work produced by the selected firm must demonstrate quality and depth of understanding of subject matter. Respondents may want to include samples of work or descriptions of work or awards received that demonstrate this standard. You may also provide a link for your firm's Web site if you have one. (Reminder: Providing a mountain of "slick"



pieces that your firm has produced in the past WITHOUT the process by which you arrived at the final product, will not win points).

2. The selected Contractor will work with the Director of Communications and their staff in coordinating assignments and projects, not directly with divisional staff. However, the work produced by the selected firm must demonstrate that the firm's staff members have the capacity to listen carefully and sift through input provided by several different personality types within divisions to produce the desired product in as few tries as possible.
3. Demonstrate a reasonable working knowledge of housing, community development, and homeless issues

## EXHIBIT B

### PROPOSAL INSTRUCTIONS AND SELECTION CRITERIA

#### I. PROPOSAL DELIVERY/SUBMISSION:

**A. Due Date.** The due date for the Authority's receipt of the proposals responding to this Request for Proposal ("RFP") is **Friday, May 16, 2008 at 4 p.m.**

**B. Originals and Copies:** Submit one (1) original and three (3) copies of a proposal to provide the services described in Exhibit A (Scope of Work).

**C. Delivery of Proposal:** Addresses for the delivery of proposals are as follows:

**DELIVERY VIA HAND DELIVERY OR COMMERCIAL  
OVERNIGHT SERVICE:**

**Mary Lou Keenon**

Michigan State Housing Development Authority  
735 E. Michigan Avenue  
Lansing, MI 48912

**DELIVERY VIA U.S. POSTAL SERVICE:**

**Mary Lou Keenon**

Michigan State Housing Development Authority  
P.O. Box 30044  
Lansing, MI 48909

**DELIVERY VIA E-MAIL**

[keenonm@michigan.gov](mailto:keenonm@michigan.gov)

**D. Selection of Proposal.** The selected proposal will be announced Friday, May 23, 2008 via e-mail and posting on the Authority's Web site.

#### II. PROPOSAL FORMAT:

**A. Overview:** Proposals must be submitted in the format described in Section B (Format of Proposal) below. There should be no attachments, enclosures or exhibits other than those considered by

the prospective contractor ("Prospective Contractor") to be essential to a complete understanding of the proposal. Each section must be clearly identified with appropriate headings.

The proposal should be clear, accurate, and complete, with sufficient detail to enable the Authority to evaluate the services and methods proposed. Brevity is appreciated, but creativity in responding to the material that is asked for is essential.

**B. Format of Proposal:**

1. **BUSINESS ORGANIZATION.** Answer/Address the following:
  - a. Full name and address of Firm:
  - b. Branch office if applicable:
  - c. Type of entity (e.g., Michigan corporation, Michigan nonprofit corporation, Michigan limited liability company):
  - d. If entity is foreign (i.e., non-Michigan), is it licensed to do business in Michigan?
  - e. Submit Certificates of Status dated within 30 days if firm is a Michigan entity. (Certificate to proposal.)
  - f. Submit Certificate Authorizing Firm to Do Business in Michigan dated within 30 days if firm is a not a Michigan entity.
  - g. **Submit Tax Identification Number for Firm.**
2. **MANAGEMENT & PERSONNEL:** Answer/Address the following:
  - a. **Officer and Management Summary:** Identify officers and managers by name and position. Identify managers and/or officers who will manage the contract if it is awarded. (*Resumes or Curriculum Vitaes of managers or officers may be provided.*)
  - b. **Bidder's Authorized Contact:** Include the name and telephone number of person(s) in your

organization authorized to expedite any proposed contract with MSHDA. An official authorized to commit the bidder to the terms and conditions of the proposal must sign the proposal. The Provider must clearly identify the full title and authorization of the designated official and provide a statement of bid commitment with the accompanying signature of the official.

### 3. EXPERIENCE

- a. **Prior Experience of Firm:** Indicate prior experience of your firm that you consider relevant to the successful accomplishment of the project described in this RFP. Include sufficient detail to demonstrate the relevance of such experience. Include descriptions of qualifying experience, including project descriptions, costs if you feel they are applicable, and starting and ending dates of projects successfully completed. Also include name, address, and telephone number of the responsible official of the client organization who may be contacted.
- b. **Experience of Proposed Personnel Assigned to Provide Services:** Describe the education and experience of personnel who will likely be assigned to provide the proposed services, including managers who may oversee work of personnel. *(Provide resumes or curriculum vitae of assigned personnel as attachments/enclosures.)*
- c. **Additional Information and Comments:** Include any other information that is believed to be pertinent but not specifically asked for elsewhere.

### 4. PROPOSED SERVICES

- a. **How Service Will be Rendered:** Describe how the services will be rendered. Address and describe the process used to render the services.
- b. **Use of Subcontractors:** If any work will be subcontracted, describe the following:
  - i. Work that will be subcontracted;
  - ii. The process used to select the subcontractors;
  - iii. The contractor's experience and expertise; and

- iv. The names of the firms/individual(s) who will perform the subcontracted work.
- c. **Standards:** Describe or address the following:
  - i. How quality of service will be monitored and ensured.
  - ii. Whether "best practices" will be followed. (If applicable, identify, the organization and/or document that establishes such standards.)
- d. **Security of Data:** If the services to be rendered require the collection and/or use of confidential and/or personal data, confirm the following:
  - i. Has your firm established and used a policy to address the security of paper and electronic data. **(Please do not submit a copy of your security policy.)**
  - ii. Does your policy address the removal of confidential and/or personal data from storage media? (For example, does your firm's policy include the removal or "wiping" of data from hard drives when a computer is no longer used?)
- e. **Copyrighted Materials.** If the services require the production of a written product for the Authority, please confirm the following
  - i. Any and all products produced as a result of this contract shall be the property of the Authority.
  - ii. Your agreement that the Authority shall (a) hold a copyright on all materials or products produced under the contract and (b) be allowed to file for a copyright with the United States Copyright Office.
  - iii. Your acknowledgment that submitted documents will not contain in part or whole copyrighted materials.
  - iv. At the request of the Authority, the Contractor will register service marks, trademarks and copyrights on behalf of the Authority and assign all rights to those service marks, trademarks and copyrights to the Authority. The Contractor must agree that it will have

no property rights in any intellectual property created in conjunction with the contract unless the Authority explicitly agrees in writing.

- v. **The Contractor will provide an individual CD or DVD of each item produced for the Authority that contains commercials, videos, photographs, brochures, logos, purchased images, photos or graphics, etc. In addition, the disks must contain all information regarding the produced piece, including pantone color, fonts, sizing specifications, and other information relevant to reproducing or reprinting the piece.**

## 5. PRICE PROPOSAL & BUDGET

- a. **Price Proposal:** All rates quoted in proposals submitted in response to this RFP will be firm for the duration of the contract. No price changes will be permitted.
- b. A prospective Contractor is asked to **convincingly** demonstrate their capacity, experience and ability to perform or deliver each of the tasks, activities or projects described in the Scope of Work (Exhibit A) within the parameters defined. Bids must be submitted on a per unit basis, not as a total contract amount. For example: Graphic design - \$X amount per hour; design consulting meeting - \$X amount per hour, strategic planning consulting - \$X amount per hour, general meetings - \$X amount per hour, time spent at conference - \$X amount per hour, writing - \$X amount per hour, web management - \$X amount per hour, web content updates - \$X amount per hour, radio production/TV production - \$X amount per hour. Be as specific as possible in the categories you select as they relate to the activities described. The more specific your submission and the higher the quantity of categories, the better. If preferred, a flat fee for any task or activity may be used. A total contract amount will be formulated with the Contractor based upon the

per unit (or flat) fees after the selection process has been completed and the successful Contractor named. For planning purposes, the total amount of the contract could be, but is not guaranteed, to be in the \$300,000 (plus or minus) range. This contract may also be negotiated as a multiyear contract in the plus or minus range of \$900,000.

**c. Expense Items:** In addition to Section 5b above, include in the proposal all items related to the work to be performed that you typically charge to the client. The itemization should include applicable items, which may include the following. Add any others that will apply to your individual situation:

- i. Costs of supplies and materials
- ii. Other direct costs
- iii. Transportation/travel costs
- iv. Mark ups on advertising and or subcontracted services
- v. Other

**6. SIGNATURE CLAUSE TO BE SIGNED BY AUTHORIZED SIGNATORY OF FIRM**

**Signature Clause:** Insert the following signature clause at the end of the proposal and have an authorized signatory for the firm sign it:

**I confirm that I have submitted this proposal on behalf of \_\_\_\_\_ (Insert name of firm) in response to the Michigan State Housing Development Authority's Request for Proposals for Insert service sought by Authority.**

**By:\_\_\_\_\_**

**Its:\_\_\_\_\_**

**Date:\_\_\_\_\_**

**III. Selection of Proposal**

**A. Selection Criteria.** Appropriate Authority staff will select the proposal based on Selection Criteria listed below:

- |    |  |                     |
|----|--|---------------------|
| 1. | Experience, education or certification   | (10 Points)         |
| 2. | Demonstrated knowledge of the Authority's programs and operations  | ( 5 Points)         |
| 3. | Communication skills, including clarity of proposal  | (15 Points)         |
| 4. | Capacity of staff necessary to perform services required   | (25 Points)         |
| 5. | Amount of time available to perform services   | (10 Points)         |
| 6. | Creativity of proposal (demonstrate creativity by reflecting your understanding and interpretation of instructions in your proposal) | (25 Points)         |
| 6. | Reasonableness and Feasibility of Fees   | (10 Points)         |
| 7. | <b>PENALTY FOR FAILURE TO FOLLOW INSTRUCTIONS</b>  | <b>(-10 POINTS)</b> |

**Total Possible Points: 100 Points**

- B. Expected Deadline for Selecting Proposal.** The Authority expects to confirm selection of the proposal by e-mail and/or posting on the Authority's Web site by **May 23, 2008**.
- C. Cancellation of Selected Proposal.** The selection of a proposal by the Authority may be cancelled at any time prior to the complete execution of a contract. Reasons for canceling the selected proposal may include, but are not limited to, the following:
1. Refusal of Department of Civil Service to process required forms; and/or
  2. Refusal of duly authorized Authority signatory to execute the contract.

If the Authority cancels its selection of a proposal, the Authority may repost this or a similar RFP and re-seek proposals.